

# 2012 INCOME TAX ORGANIZER

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**NEW CLIENTS:** Bring, email or fax a copy of Prior Year Tax Returns.

## General Information

Your Name: \_\_\_\_\_ Spouse's Name: \_\_\_\_\_

SS# \_\_\_\_\_ SS# \_\_\_\_\_

Address: \_\_\_\_\_ Dependents that live with you:

\_\_\_\_\_ Name: \_\_\_\_\_

\_\_\_\_\_ SS# \_\_\_\_\_

DOB: \_\_\_\_\_

Phone Numbers:

Home: \_\_\_\_\_ Name: \_\_\_\_\_

Cell: \_\_\_\_\_ SS# \_\_\_\_\_

Work: \_\_\_\_\_ DOB: \_\_\_\_\_

## INCOME

Wages (W-2's):

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Pensions, IRA Distributions:

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Interest Income:

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Dividend Income:

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Stock Sales:

Date Original Sales

Acquired Sold Cost Price

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**BUSINESS INCOME**

Self-Employed (Schedule C) yes \_\_\_\_\_ no \_\_\_\_\_

Name of Business \_\_\_\_\_

**Income:** \$ \_\_\_\_\_

**Expenses:**

Accounting \_\_\_\_\_

Advertising \_\_\_\_\_

Answering service \_\_\_\_\_

Bank charges \_\_\_\_\_

Commissions \_\_\_\_\_

Cost of labor \_\_\_\_\_

Delivery & freight \_\_\_\_\_

Materials & supplies \_\_\_\_\_

Dues & subscriptions \_\_\_\_\_

Employee benefit programs \_\_\_\_\_

Insurance (not health) \_\_\_\_\_

Mortgage interest (paid to banks) \_\_\_\_\_

Other interest \_\_\_\_\_

Janitorial \_\_\_\_\_

Laundry & cleaning \_\_\_\_\_

Legal & professional \_\_\_\_\_

Miscellaneous \_\_\_\_\_

Office expense \_\_\_\_\_

Outside services \_\_\_\_\_

Parking & tolls \_\_\_\_\_

Pension & profit sharing plans \_\_\_\_\_

Postage \_\_\_\_\_

Printing \_\_\_\_\_

Rent – vehicles, machinery & equipment \_\_\_\_\_

Rent – other business property \_\_\_\_\_

Repairs \_\_\_\_\_

Security \_\_\_\_\_

Supplies \_\_\_\_\_

Taxes – real estate \_\_\_\_\_  
Taxes – payroll \_\_\_\_\_  
Taxes – other \_\_\_\_\_  
Telephone \_\_\_\_\_  
Tools \_\_\_\_\_  
Travel \_\_\_\_\_  
Total meals & entertainment in full (50%) \_\_\_\_\_  
Department of Transportation meals in full (65%) \_\_\_\_\_  
Uniforms \_\_\_\_\_  
Utilities \_\_\_\_\_  
Wages \_\_\_\_\_  
Other expenses:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**RENTAL PROPERTY**

Location/Description:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Rental Income:** \$ \_\_\_\_\_

**Expenses:**

Advertising \_\_\_\_\_  
Association dues \_\_\_\_\_  
Auto & travel \_\_\_\_\_  
Cleaning & maintenance \_\_\_\_\_  
Commissions \_\_\_\_\_  
Gardening \_\_\_\_\_  
Insurance \_\_\_\_\_  
Legal & professional fees \_\_\_\_\_  
Licenses & permits \_\_\_\_\_  
Management fees \_\_\_\_\_  
Miscellaneous \_\_\_\_\_  
Mortgage interest \_\_\_\_\_  
Other interest \_\_\_\_\_  
Painting & decorating \_\_\_\_\_

Pest control \_\_\_\_\_  
Plumbing & electrical \_\_\_\_\_  
Repairs \_\_\_\_\_  
Supplies \_\_\_\_\_  
Taxes – real estate \_\_\_\_\_  
Taxes – other \_\_\_\_\_  
Telephone \_\_\_\_\_  
Utilities \_\_\_\_\_  
Wages & salaries \_\_\_\_\_  
Other \_\_\_\_\_

**ITEMIZED DEDUCTIONS**

Interest and Taxes:

Home Mortgage Interest: \$ \_\_\_\_\_

Home Equity Loan: \$ \_\_\_\_\_

Home Property Tax: \$ \_\_\_\_\_

Charity Contributions:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Medical Expenses > 7.5% of your income:

\_\_\_\_\_  
\_\_\_\_\_

Casualty Losses :

\_\_\_\_\_  
\_\_\_\_\_

**OTHER DEDUCTIONS**

Other:

Self-employment Health Insurance:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Daycare Expenses?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

IRA Contributions?

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**AUTO EXPENSES**

Auto Expenses:

Total Miles: \_\_\_\_\_

Business Miles: \_\_\_\_\_

Did you buy a vehicle this year? yes \_\_\_\_\_ no \_\_\_\_\_

Provide description, cost and date acquired:

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**Contact Info:**

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**Baton Rouge:** (225) 292-7434

2915 S. Sherwood Forest Blvd. Suite B

Baton Rouge, La 70816

Directions:

S. Sherwood Forest Blvd.

1/2 mile from I-12

Next to Citizens Bank

**Mandeville:** (985) 674-9092

The Village Executive Center

2895 Hwy 190 E.

Suite 230

Mandeville, La 70471

Directions:

Highway 190 east to Meadowbrook Drive

In the Pelican Village Shopping Center (above Martin's Wine Cellar, next to N'Tini's)